

CM-ECF GENERAL DOCKETING PROCEDURE

This module addresses the electronic filing of documents /pleadings **other** than petitions, complaints, proof of claims, and matrices, etc.

Locating these **events** within the CM/ECF system is easy. Log-in to **CM/ECF System** with the passwords you were given as a user. There are two main menus of event categories which appear; **Bankruptcy** or **Adversary**. Click the hyperlink on the main tool bar depending on the nature of the pleading being filed.

Click **Bankruptcy** and The Bankruptcy Events menu will appear. This menu displays a list of categories from which the type of document being filed is selected. **Motions/Applications, Claims, Objections/Responses and Bankruptcy/Adversary Case Opening** have previously been covered under separate documentation. This module will provide information on **Appeals, Miscellaneous/Other** and the **Plan/Disclosure Statement** categories. All categories are shown in **figure 1** below:



figure 1

APPEALS: To docket appeal related documents:

- STEP 1** Click ***“Appeal”*** in either the Bankruptcy or Adversary category off the blue **CM/ECF Main Menu Bar**.
- STEP 2** Instructions for “relating” documents appears on the next screen. Make note and Click **[Next]** (see figure 2 below)

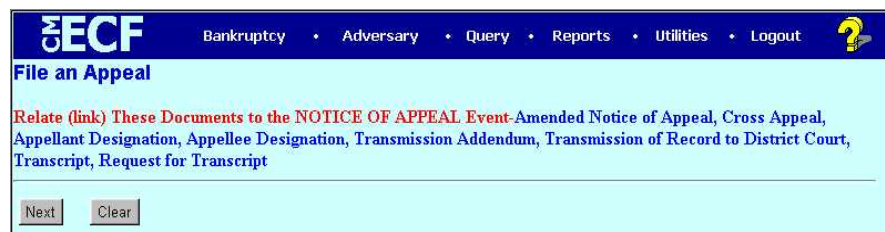


figure 2

- STEP 3** Enter the **Case Number**.
- STEP 4** Select the document type from the drop down menu.
- STEP 5** **Browse** for the **PDF**.
- STEP 6** Select the **Party Filer**.

- STEP 7** The Financial information appears on the next screen. Enter **CC** in the Receipt field. Select the appropriate order being appealed. Check the box next to the order. Click **Next**. (see figure 3)



figure 3

- STEP 8** The **Final Docket Text Window Screen** appears. This screen provides a final review of the entry being made. Once this screen is committed to the system, the entry cannot be modified or corrected by the filer. Be sure the entry is correct before submitting this transaction. If an error is realized after transmission, contact the Clerk's office immediately. Click **Next**. (see figure 4)



figure 4

STEP 9 The **Notice of Electronic Filing Screen** appears and confirms that the submission has been completed.

OTHER/MISCELLANEOUS:

The **“Other”** category is utilized by both Court staff and external users. The Court uses this category to docket petitions filed over the counter (conventionally) along with other docketing. Electronic filers use either the **Open a BK Case** or **Case Upload** feature to file new cases but will choose the **“Other”** category when docketing miscellaneous documents such as 20 Largest Unsecured Creditor List, Amended Matrix, Briefs, Monthly Operating Reports, Reaffirmation Agreements, Schedules (not filed at the time of the petition), etc.

STEP 1 Select the **“Other”** category under either the **Bankruptcy** or **Adversary hyperlink**.

STEP 2 Enter the **case number**. Click **Next**.

STEP 3 Review the drop down box and make a selection according to the type of miscellaneous document being filed. For this exercise, we will be filing a Brief in Support of Motion. Click **Next**.
(see figure 5)



The screenshot shows the CM-ECF web interface. At the top, there's a navigation bar with links: Bankruptcy, Adversary, Query, Reports, Utilities, Logout, and a help icon. Below this, the page title is 'Miscellaneous'. The main content area has a text input field containing '03-10035-fm Joe Black'. Below the text field is a dropdown menu with the following options: Amended Petition, Amended Schedules (Conversion), Amended Schedules (With Schedules D, E, F), Amended Schedules (without D, E, or F), Appearance of Child Support Creditor, Brief/Memorandum (which is highlighted), and Certificate of Non-Compliance. At the bottom of the form are two buttons: 'Next' and 'Clear'.

figure 5

- STEP 4** Select the **Party Filer**. Click **Next**.
- STEP 5** **Browse** for the PDF. Click **Next**.
- STEP 6** Many documents filed in the “**Other**” category such as the Brief in Support being demonstrated “**refer**” to an existing document. Check the box if the document being filed refers to another document and complete the white text box with correct information. Click **Next**. (see figure 6)



ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Miscellaneous:

[03-10035-firm Joe Black](#)

☒ Refer to existing event(s)?

Enter: Is Brief/Memorandum Support of OR Opposition to?

figure 6

- STEP 7** The ***Related Document Screen*** appears. If the document being filed is related to a previously filed document, select the “**category type**” of the related document. You may also limit the amount of documents displayed, by narrowing the search to include dates filed and document numbers. Click **Next**. (see figure 7)

figure 7

- STEP 8** Select appropriate event to which your event relates. Click **Next**. (see figure 8)

figure 8

- STEP 9** The ***Modify Docket Text Window Screen*** appears. Review the text window for proper content. Corrections to the entry may be made by utilizing the **BACK** button. Once the text reads correctly, Click **Next**. (See figure 9)

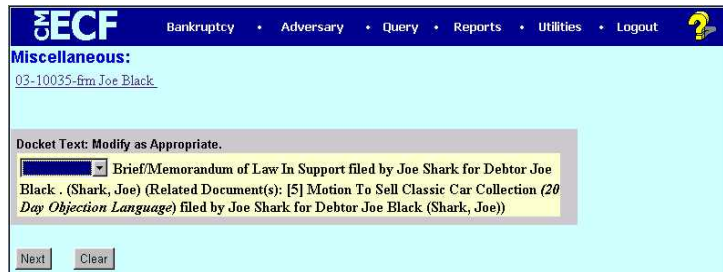


figure 9

- STEP 10** The ***Final Docket Text Window Screen*** appears. This is the final opportunity to make any changes to the entry before committing to the system. No changes can be made to this entry after submitting this screen. Please notify Court Staff if any errors exist **after** submission.
- STEP 11** The ***Notice of Electronic Filing Screen*** appears completing the transaction. Refer to the **CM/ECF Main Menu Bar** to continue docketing.

PLAN/DISCLOSURE STMT/OBJ TO PLAN:

- STEP 1** Select the ***Plan/Disclosure Stmt/Obj to Plan*** category under the ***Bankruptcy*** hyperlink on the **CM/ECF Main Menu Bar**.
- STEP 2** Enter the **case number**. Click **Next**.
- STEP 3** Review and select the appropriate option in the drop down box. (see **figure 10 below**)

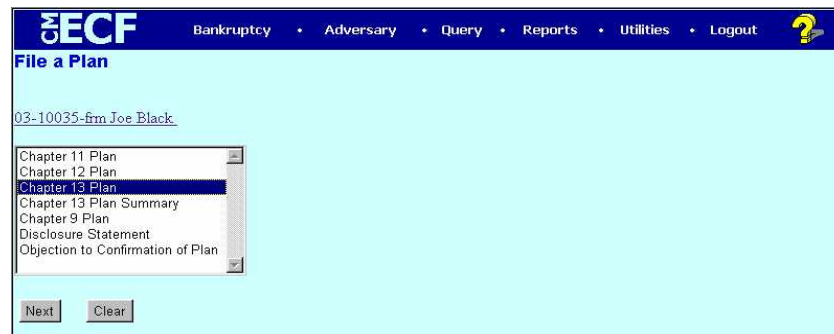


figure 10

- STEP 4** Select the **Party Filer** of the document.
- STEP 5** **Browse** for the correct PDF document

- STEP 6** The ***Related Document Screen*** appears. If the plan or the disclosure statement is being filed for the first time, there would be no linkage created. If you are filing an ***objection*** to the confirmation of plan this entry would be ***linked/referred back to the plan*** (existing event) to which you have objection. Check the box to create a linkage. The search may be limited if filed date and document number of the existing event are included in this search. Click **Next** if no document is to be referenced. (see figure 11)



figure 11

- STEP 7** The ***Modify Text Window Screen*** appears. This screen provides an opportunity to review the entry and use the ***BACK*** button for any corrections necessary.
- STEP 8** The ***Final Text Window Screen*** appears. This screens provides a final opportunity to make any corrections to the entry before committing it to the system. Once submitted, only the Court has the ability to edit this event.
- STEP 9** The ***Notice of Electronic Filing Screen*** appears.
- STEP 10** Make a selection on the **CM/ECF Main Menu Bar** to continue filing in the system.